



**Solicitation Information
March 13, 2015
Solicitation**

RFP # 7549412

TITLE: MPA 508 - Energy Efficiency Services

Submission Deadline: Wednesday April 15, 2015 at 11:00 am (Local Time)

PRE-BID CONFERENCE: NO

Questions concerning this solicitation may also be e-mailed, in Word format to the Division of Purchases at thomas.bovis@purchasing.ri.gov no later than **3/27/2015 (LT)**. Please reference the RFP # on all correspondence. Questions received, if any, will be answered and posted on the internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: No

BOND REQUIRED: No

**Thomas Bovis
Interdepartmental Project Manager**

Vendors must register on-line at the State Purchasing Website at www.purchasing.ri.gov

NOTE TO VENDORS:

Offers received without the entire completed RIVIP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

SECTION 1 – INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS

1.1) INTRODUCTION

The Rhode Island Department of Administration (“Department”), Division of Purchases (“Division”), on behalf of the Office of Energy Resources (“OER”), is soliciting proposals from qualified vendors to provide turnkey energy efficiency services to public sector entities under a Master Price Agreement (“MPA”). Turnkey energy efficiency services is defined as: performance of energy audits; identification and payback analysis of energy efficiency measures; recommendation of appropriate energy efficiency measures, installation services, material and labor warranties; and appropriate reporting and facilitating of National Grid (Utility) or other available incentives or rebates. This MPA is designed to support energy efficiency projects which leverage existing Utility and other available incentives and services. In particular, qualified vendors are expected to demonstrate their understanding and utilization of Utility-administered incentive offerings.

An MPA is an agreement between the State and a qualified vendor[s] to provide services or goods as needs arise in the future. **This MPA may be awarded to one (1) or more qualified firms at the sole discretion of the State. There is no guarantee of any level of purchasing activity on behalf of the State to any vendor or vendors listed on the MPA.** Vendors are required to provide a quote for each discrete project requested by user agencies.

MPA-xxx vendors may be utilized by any State agency. In addition, MPA-xx vendors may be utilized by quasi-public agencies, Rhode Island municipalities, school districts, water and waste water facilities at their own discretion. Placement of vendors on MPA-xxx is no guarantee of future business. All ordering and billing shall be between the vendor and the user agency. Services are sought on an “as-needed” basis. Once need has been determined, utilization by the user agency will be based on a number of factors, including - but not limited to price, expertise, and availability.

Firms will be ranked in the master qualifying list according to their technical evaluation scores.

Agency engagement for a specific energy efficiency project under \$50,000 will include an evaluation stage for proposals from at least one qualifying vendor for the proposed scope of work.

Agency engagement for a specific project between \$50,000 and \$600,000 will include a competitive technical evaluation stage for the proposed scope of work including, at a minimum, three qualifying vendors. A composite score that considers project cost and other project criteria will determine the vendor selected.

For total projects costing more than \$600,000 the user agencies shall **not use** the MPA and shall issue a distinct Request for Proposal (RFP) for the specific project.

Vendors are required to provide a quote *for each discrete* project requested by user agencies. The Division of Purchases has the authority to remove vendors from the MPA list if non-responsive to agency requests for quotes. There is no guarantee of any level of spending activity to a vendor or vendors selected for this MPA.

This solicitation, and subsequent award, is governed by the State's General Conditions of Purchase, which are available at www.purchasing.ri.gov. To access the State's General Conditions of Purchase, enter the website, click on "RIVIP", then click on "General Information," then click on "Rules and Regulations." Once the Rules and Regulations are displayed, scroll to the bottom of the page and double click on "Appendix A," which contains the State's General Conditions of Purchase.

Award of an MPA price agreement shall not be considered as a guarantee of a vendor being selected by user agencies, nor a commitment by the Division of Purchases that a vendor will receive business from the State or its subdivisions.

1.2) NOTIFICATIONS TO OFFERORS:

- a) Potential Respondents are advised to review all sections of this RFP carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.
- b) In order to submit a proposal, Respondents must properly register with the State of Rhode Island. For information of registering, please see the Division's website at www.purchasing.ri.gov and under the heading "Vendor Registration Information".
- c) All proposals shall include the Respondent's FEIN or Tax Identification number as evidenced by a W9, downloadable from the Division's website at www.purchasing.ri.gov.
- d) Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP will be rejected as being non-responsive.
- e) All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content shall be borne by the offeror. The State assumes no responsibility for these costs.
- f) Proposals submitted in response to this solicitation shall be considered to be irrevocable for a period of not less than ninety (90) days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.
- g) All pricing submitted by Respondents in response to this solicitation shall be considered to be firm and fixed unless otherwise indicated herein.

- h) Proposals misdirected to other than the Division of Purchases, or which are otherwise not submitted to the Division of Purchases prior to the time of opening for any cause shall be determined to be late and shall not be accepted, opened, or considered. The official time clock is located in the reception area of the Division of Purchases, 2nd floor, One Capitol Hill, Providence, Rhode Island.
- i) In accordance with R.I. Gen. Laws § 7-1.2-1401 no foreign corporation has the right to transact business in Rhode Island until it has procured a certificate of authority so to do from the Secretary of State (401/222-3040) www.sos.ri.gov. However, this is a requirement only for successful bidder (s).
- j) Respondents are advised that all documents and materials submitted to the Division of Purchases for consideration in response to this solicitation shall be considered to be public records, as defined in Title 38 Chapter 2 of the Rhode Island General Laws.
- k) Respondents should be aware of all applicable MBE requirements, as set forth in R. I. Gen. Law § 37-14.1-1, *et seq.* The State's goal is for a minimum ten per cent (10%) participation by MBE's in all State procurements. For further information, contact the State MBE Administrator at (401) 574-8253 or charles.newton@doa.ri.gov, Visit the website <http://www.mbe.ri.gov/>
- l) Interested parties are instructed to peruse the Division of Purchases web site on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.
- m) Equal Employment Opportunity-R. I. Gen. Laws § 28-5.1 Declaration of Policy. – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies in all areas where the state dollar is spent, in employment, public service, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via e-mail raymond1@gw.doa.state.ri.us
- n) Subcontractors are permitted for this project, provided that the scope of the subcontractor's services are clearly stated in the Respondent's proposal.
- o) Questions concerning this solicitation may be e-mailed to the Division of Purchases in accordance with the terms and conditions expressed on the cover page of this solicitation. All questions received by the Division of Purchases shall be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to monitor the Division of Purchases' website for updated solicitation information and addenda.
- p) The Division of Purchases reserves the right to accept or reject any or all proposals

submitted in response to this solicitation, to waive minor irregularities, or to negotiate with any Respondents, as necessary, to serve the best interests of the State.

SECTION 2 - SCOPE OF WORK

The purpose of the RFP is to establish an MPA for vendors to provide turnkey energy efficiency services for both electric and gas energy efficiency measures. Other fuels may be included in the cost benefit analysis to help a project's overall cost effectiveness. Vendors are strongly encouraged to identify and leverage all appropriate and available project incentives and rebates, including, but not limited to, Utility-administered incentives.

At minimum, qualified vendors will be expected to perform the following functions:

- Conduct energy efficiency audits;
- Recommend appropriate energy efficiency measures;
- Provide analysis of project economics;
- Maximize benefits of incentive programs;
- Provide complete installation services;
- Provide extended material and labor warranties;
- Coordinate with the Utility on recycling ballasts when necessary;
- Supply required documentation in support of incentive application processing;
- Comply with any required reporting requirements; and
- Marketing and outreach to Rhode Island customers, focused on energy efficiency facility assessment and implementation.

Qualified vendors will be expected to provide these services for energy efficiency technologies and equipment including, but are not limited to:

- Lighting and lighting controls;
- HVAC efficiency improvements;
- Energy management systems;
- Motor upgrades in conjunction with Variable Speed Drives;
- Gas heating equipment, controls and water heating equipment;
- Gas kitchen equipment; and
- Other custom electric and gas energy saving measures.

SECTION 3 - PROPOSAL REQUIREMENTS

Proposals must include the following:

Proposals shall contain the following information and shall be formatted as described below. Bidder adherence to these instructions for proposal format will be a factor in evaluation of proposals.

Completed Application Form: See Appendix A

Application Summary Statement (4 pages maximum): Describe your company's capabilities to fulfill the scope of services described in SECTION - 2. This statement should emphasize the company's knowledge and understanding of Utility-administered energy efficiency programs. Provide a brief description of the history of the company. Provide a description of any specific services or software your company uses in the delivery of your services or products.

Customer Projects: Provide detailed explanation of six (6) completed energy efficiency projects that your company has completed, including copies of audit reports and customer proposals. Projects located in the ISO-NE region are preferred. Please include any projects that utilized public sector subsidies/incentives and/or utility-administered incentives, if applicable. Please include the associated utility application number, where applicable.

Business References: Five (5) public and/or private sector customer references. Rhode Island references are preferred.

Resumes: Provide resumes for the principals of your firm and any key staff that will be involved in designing/implementing energy efficiency projects. Please explain how these principals and staff will be organized and deployed to deliver the services in the most efficient manner.

Safety Procedures and Practices: Please discuss what practices and procedures are used when collecting data or evaluating equipment at customers facilities.

Vendors shall acknowledge in their proposal that the following items will be required if selected to perform services:

Background Check: Background Check is required only from successful vendors and is not required at the time of the response to the RFP

Insurance: Insurance is required only from successful vendors and is not required at the time of response to the RFP.

Safety Programs and Record: Information regarding vendor Safety Programs and Safety Record is Information required only from successful vendors and is not required at the time of response to the RFP.

Environmental Requirements: Vendors must comply with all applicable State and Federal regulations if selected.

SECTION 4 - PROPOSAL SUBMISSION

- a) Proposals to provide the services set forth in this solicitation must be received by the Division of Purchases on or before the date and time indicated on page one of this solicitation. Responses (a clearly labeled **original** plus five (5) copies) should be mailed or hand-delivered in a sealed envelope marked with the RFP number

**RI Dept. of Administration
Division of Purchases, 2nd floor
One Capitol Hill
Providence, Rhode Island 02908-5855**

- b) **Reminder:** Proposals misdirected to locations other than the Division of Purchases, or which are otherwise not submitted to the Division of Purchases prior to the time of opening for any cause shall be determined to be late and shall not be accepted, opened, or considered. The "official" time clock is located in the reception area of the Division of Purchases, 2nd floor, One Capitol Hill, Providence, Rhode Island.

ADDITIONAL PROPOSAL CONTENTS

- a) In addition to the contents described above proposals must include the following:
1. A completed and signed RIVIP generated Respondents certification cover sheet (downloaded from the Division of Purchases' website <http://www.purchasing.ri.gov>)
 2. A completed and signed IRS Form W-9 downloaded from the Division of Purchases' website, should **only** be included in the **original copy**.
 3. In addition to the multiple hard copies of proposal required, Respondents are requested to provide their proposal in electronic format (CD-Rom, Diskette, flash drive). Microsoft Word / Excel or PDF for is preferable. Only one (1) electronic copy is requested. This CD or diskette should be included in the proposal marked "Original".

SECTION 5 – EVALUATION AND SELECTION

Proposals will be reviewed by a Technical Review Team. Points will be assigned based on the offeror's proposal. The State reserves the right, at its sole discretion, to determine the number of vendors to be selected to participate on the Master Price Agreement.

If voluntarily selected by a quasi-public agencies, Rhode Island municipality, school district, or water and waste water facility, vendors selected to participate on the State's Master Price Agreement created as a result of this RFP shall offer their services to Municipalities and School Districts under the same terms and conditions provided.

Notwithstanding anything above, the Division reserves the right to unilaterally: 1) cancel the solicitation at any time; 2) waive any technicality in order to act in the best interests of the State; and 3) to conduct additional negotiations as necessary.

Proposals found to be technically or substantially non-responsive, at any point in the evaluation process, will be rejected and not be considered further. The State, at its sole option, may elect to require presentation(s) by bidders in consideration for the award. An award will not be made to a contractor who is neither qualified nor equipped to undertake and complete the anticipated projects.

The Division of Purchases reserves the exclusive right to select the individual(s) or firm (vendor) that it deems to be in its best interest to accomplish the scope of work as specified herein; and conversely, reserves the right not to fund any proposal(s).

Proposals will be reviewed and scored based on the following criteria:

<u>Criteria</u>	<u>Points</u>
<i>Types of projects - level of experience and expertise successfully recommending and implementing energy efficiency retrofit projects in the public sector that utilize utility incentives and achieve deep energy savings.</i>	50
<i>Capability and relevant experience of the vendor to provide the required services.</i>	30
<i>Customer references</i>	10
<i>Proposal format and overall quality</i>	10
TOTAL	100

Offerors MUST SCORE a minimum of seventy (70) points to be included on the proposed Master Price Agreement as a Project Expeditor. The resulting final score will become the ranking, from highest to lowest score, all of the vendors included in the MPA. Designation as a qualified service provider for this proposed agreement is no guarantee of future contract award.

The ranked findings and selection recommendation will be submitted to the State Purchasing Agent, or her designee, who will make the final award decision(s).

The review team will present written findings, including the results of all evaluations, to the State Purchasing Agent or designee, who will make the final selection for this solicitation. When a final decision has been made and a contract awarded, a notice will be posted on the Rhode Island Division of Purchases web-site.

ATTACHMENT A – APPLICATION FORM

Turnkey Energy Efficiency Service Providers
Application Form – Bidder Data Sheet

Company Name: _____

Address: _____

City: _____

State: _____

Zip: _____

Mailing Address (enter ONLY if it is different from contact address above)

Street Address: _____

City: _____

State: _____

Zip Code: _____

Contact Name: _____

Title: _____

Phone\Number: _____

Fax Number: _____

E-Mail Address: _____

Company Type: _____

Fed ID Number: _____

Signature and Date: _____